

HOW AI AGENTS STREAMLINE INVOICING

MESHA

How Intelligent Partners Leveraged Mesha's AI Billing Agent, Marcus, to Optimize Invoicing and Payments

In today's fast-paced business environment, managing cash flow and ensuring timely payments are critical for maintaining a healthy financial state, especially for consulting firms. This case study explores how Intelligent Partners, a leading consulting firm, significantly improved their cash flow and operational efficiency by implementing Mesha's AI-driven billing agent, Marcus.

Intelligent Partners, renowned for providing strategic consulting services to a diverse clientele, faced growing challenges with their invoicing processes. The firm struggled with manual, time-consuming billing tasks, leading to delayed payments and inefficient cash flow management. These challenges not only strained their financial operations but also impacted their ability to focus on core consulting activities.

To address these issues, Intelligent Partners turned to Mesha, a cutting-edge software solution provider specializing in AI-driven tools. At the heart of Mesha's offerings is Marcus, an intelligent billing agent designed to automate invoicing, follow up on overdue payments, and provide real-time insights into financial operations.


Upon integrating Marcus into their workflow, Intelligent Partners saw immediate improvements. The automation of invoice generation and follow-up processes reduced manual work, allowing the finance team to focus on more strategic tasks. Marcus also enabled the firm to maintain a healthier cash flow by ensuring quicker payment cycles and reducing the number of outstanding invoices.

Marcus transformed the way Intelligent Partners managed their invoicing, leading to improved cash flow, enhanced operational efficiency, and significant time savings. This case study details the

challenges faced by Intelligent Partners, the solution provided by Mesha, and the positive impact that Marcus has had on their business operations.

What is Marcus?

Marcus is an AI agent developed by mesha. It can send invoices, respond to clients and follow up via email for overdue payments. It learns from your billing history to send reminders (and keep chasing) based on each client’s payment history. It will learn the most effective ways and language to help clients pay.

	<p>With Marcus, Intelligent Partners was able to:</p> <ul style="list-style-type: none">• Automate invoicing• Automate chasing after clients for payments• Reduce overdue payments• Optimize cash flow• Increase client satisfaction			
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About mesha



Who We Are

Mesha is an AI company that specializes in providing AI-powered solutions to streamline financial and operational processes for businesses. With a strong focus on innovation, Mesha aims to help companies enhance their efficiency and improve their financial health through intelligent automation.

We build AI products for businesses.

At the core of Mesha’s offerings is Marcus, an AI billing agent designed to take the hassle out of invoicing and payment follow-ups. Marcus uses advanced LLMs to automate the generation of invoices, track payments in real-time, and send reminders to clients, ensuring that businesses maintain a steady cash flow without the need for manual intervention.

What We Do

AI Billing	AI Accounting	Software
		

Intelligent Partners' Challenge

As Intelligent Partners expanded their client base, the firm encountered significant challenges in managing their invoicing processes. The firm relied on traditional, manual methods for generating invoices and following up on payments. This approach became increasingly unsustainable as the number of clients and invoices grew, leading to several critical issues:

Time-Consuming Manual Processes: The manual invoicing process was labor-intensive and prone to errors. Generating invoices, sending them to clients, and keeping track of outstanding payments required significant time and effort from the finance team. This not only consumed valuable resources but also introduced delays in the billing cycle.

Delayed Payments and Cash Flow Impact: The inefficiencies in the invoicing process resulted in delayed payments from clients. The finance team struggled to keep up with follow-ups, leading to a backlog of overdue invoices. This, in turn, strained the firm's cash flow, making it difficult to manage operational expenses and invest in growth initiatives.

Inefficient Follow-Up Processes: The manual follow-up process was inconsistent and ineffective. Without automated reminders, the finance team had to rely on individual judgment to chase late payments, which often led to missed opportunities for timely collections. This lack of a structured follow-up system further exacerbated the cash flow challenges.

Focus Diverted from Core Activities: The time and effort required to manage the invoicing process took a toll on the finance team, diverting their focus away from more strategic financial planning and analysis. This not only affected the team's productivity but also hindered the firm's ability to make informed business decisions.

Recognizing these challenges, Intelligent Partners knew they needed a solution that could automate their invoicing processes, reduce the manual workload on their finance team, and improve their cash

flow management. They sought a technology-driven approach that could seamlessly integrate with their existing operations and provide real-time insights into their financial health.

"We were at a point where we needed to find a better way to manage our invoicing and cash flow. The traditional methods we were using were no longer sustainable, and we needed a solution that could keep up with our growth and help us maintain a healthy financial position." - Sanjeev Keshav, Managing Partner

This is where Mesha and their AI billing agent, Marcus, came into the picture, offering a promising solution to the challenges Intelligent Partners faced.

The Solution: Implementing Marcus

To address the invoicing and cash flow challenges faced by Intelligent Partners, the firm decided to implement Mesha's AI-driven billing agent, Marcus. The decision was based on Marcus's ability to automate and streamline the invoicing process, reducing the manual workload on the finance team and improving the firm's overall cash flow management.

Overview of the Implementation Process

The implementation of Marcus at Intelligent Partners was a seamless process, thanks to the collaborative efforts of both the Mesha and Intelligent Partners teams. The integration was designed to fit into Intelligent Partners' existing financial systems without causing any disruptions to their operations.

Steps in the Implementation:

Initial Assessment: Mesha's team conducted an in-depth assessment of Intelligent Partners' existing invoicing processes to identify specific pain points and areas for improvement. This assessment allowed them to customize Marcus's features to meet the firm's unique needs.

Customization and Integration: Marcus was customized to align with Intelligent Partners' invoicing templates, payment terms, and client communication preferences. The integration process involved connecting Marcus with the firm's accounting software and CRM system, ensuring a smooth flow of data between platforms.

Training and Onboarding: To ensure a smooth transition, Mesha provided comprehensive training sessions for Intelligent Partners' finance team. These sessions covered how to use Marcus's features, such as automated invoice generation, payment tracking, and follow-up automation.

Go-Live and Monitoring: After thorough testing, Marcus was officially launched within Intelligent Partners. During the initial weeks, Mesha's support team closely monitored the system's performance, making adjustments as needed to optimize its functionality.

"The implementation process was incredibly smooth. The Mesha team worked closely with us to ensure that Marcus was fully integrated into our operations without any disruption. The training provided was also top-notch, making it easy for our team to start using Marcus right away."

Key Features of Marcus Utilized by Intelligent Partners

Marcus brought several powerful features to the table, all of which were instrumental in transforming the way Intelligent Partners managed their invoicing and cash flow:

Automated Invoice Generation and Dispatch: Marcus automated the entire invoicing process, from generating invoices based on completed work to dispatching them to clients. This eliminated the need for manual input, significantly reducing the time required to create and send invoices. Intelligent Partners could now generate invoices in real-time, ensuring that clients received them promptly after services were rendered.

Intelligent Follow-Ups with Clients: One of Marcus's most valuable features was its ability to automate follow-ups on overdue invoices. Marcus tracked payment deadlines and sent automated reminders to clients, reducing the need for manual chasing by the finance team. The reminders were customizable, allowing Intelligent Partners to maintain a professional tone in their communications while ensuring timely payments.

Real-Time Tracking and Analytics: Marcus provided Intelligent Partners with real-time insights into their invoicing and payment processes. The software tracked the status of each invoice, from dispatch to payment, and generated detailed reports on payment trends, outstanding balances, and cash flow metrics. This data empowered Intelligent Partners to make informed financial decisions and proactively manage their cash flow.

Customizable Payment Terms and Options: Marcus allowed Intelligent Partners to customize payment terms and options according to their clients' needs. This flexibility improved client satisfaction and made it easier for clients to pay on time, further enhancing cash flow.

"Marcus has completely transformed our invoicing process. The automation of invoice generation and follow-ups has saved us an incredible amount of time, and the real-time tracking has given us greater visibility into our cash flow. We're now able to manage our finances more efficiently and focus on what we do best—providing top-notch consulting services to our clients." - Sanjeev K, Managing Partner

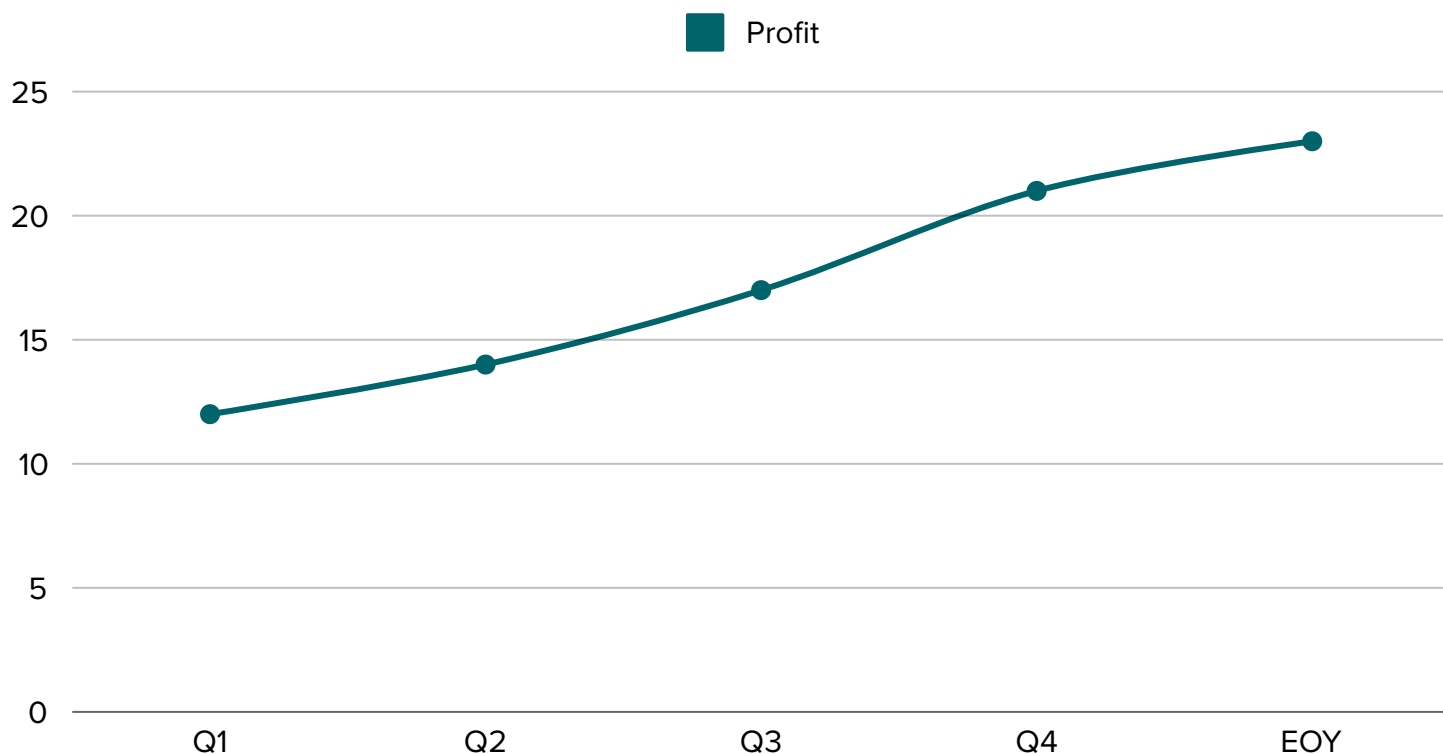
Mesha's commitment to understanding Intelligent Partners' specific needs and challenges was key to customizing Marcus in a way that delivered maximum value. This collaborative approach not only ensured a smooth implementation but also laid the foundation for a long-term partnership focused on continuous improvement and innovation.

"We believe in building strong, collaborative relationships with our clients. By working closely with Intelligent Partners, we were able to tailor Marcus to their specific needs and deliver a solution that truly made a difference. We're proud to have played a role in helping them achieve their business goals." - Tahem Verma, CEO, mesha

- Reduced overdue payments by 40%
- Improved cashflow by 45%
- Reduced costs by eliminating the need for a full-time person to do invoicing

Profit has increased every quarter since Marcus was implemented

Profit in \$M



Results & Impact

The implementation of Marcus, Mesha's AI billing agent, had a profound impact on Intelligent Partners, delivering significant improvements in both cash flow and operational efficiency. The transition from manual invoicing processes to an automated, AI-driven system brought about measurable benefits that positively influenced the firm's bottom line.

Improvement in Cash Flow Metrics

One of the most immediate and noticeable benefits of implementing Marcus was the improvement in cash flow. By automating invoice generation and dispatch, Intelligent Partners was able to ensure that invoices were sent out promptly after services were rendered, reducing the time between project completion and payment.

Key Metrics:

Reduction in Days Sales Outstanding (DSO): Marcus helped reduce the average DSO by 30%, allowing Intelligent Partners to collect payments faster and more efficiently.

Decrease in Overdue Invoices: The automated follow-up feature of Marcus led to a 40% decrease in the number of overdue invoices, as clients were regularly reminded of upcoming and past due payments.

Improved Cash Flow Predictability: With real-time tracking and analytics, Intelligent Partners gained better visibility into their cash flow, allowing them to forecast and plan more accurately.

"The impact on our cash flow was immediate. We saw a significant reduction in overdue invoices and were able to collect payments faster, which has greatly improved our ability to manage and forecast our finances."

Time Saved on Manual Processes

The automation provided by Marcus allowed Intelligent Partners to reclaim valuable time that was previously spent on manual invoicing and payment follow-up tasks. This time savings translated into increased productivity across the finance team and allowed them to focus on more strategic activities.

Key Outcomes:

50% Reduction in Time Spent on Invoicing: The finance team reported that they spent half the time on invoicing tasks compared to before, thanks to Marcus's automation features.

Increased Focus on Strategic Activities: With less time spent on routine tasks, the finance team was able to shift their focus to financial planning, analysis, and other high-value activities that contribute to the firm's growth.

Quote from Sanjeev V, Managing Partner of Intelligent Partners: "Marcus has freed up so much time for our team. Instead of getting bogged down in administrative tasks, we can now focus on more strategic initiatives that drive our business forward."

Enhanced Operational Efficiency

Marcus's integration into Intelligent Partners' workflow also led to broader operational improvements. The software's real-time tracking and analytics capabilities provided the firm with actionable insights into their financial operations, enabling them to make informed decisions more quickly and efficiently.

Key Operational Improvements:

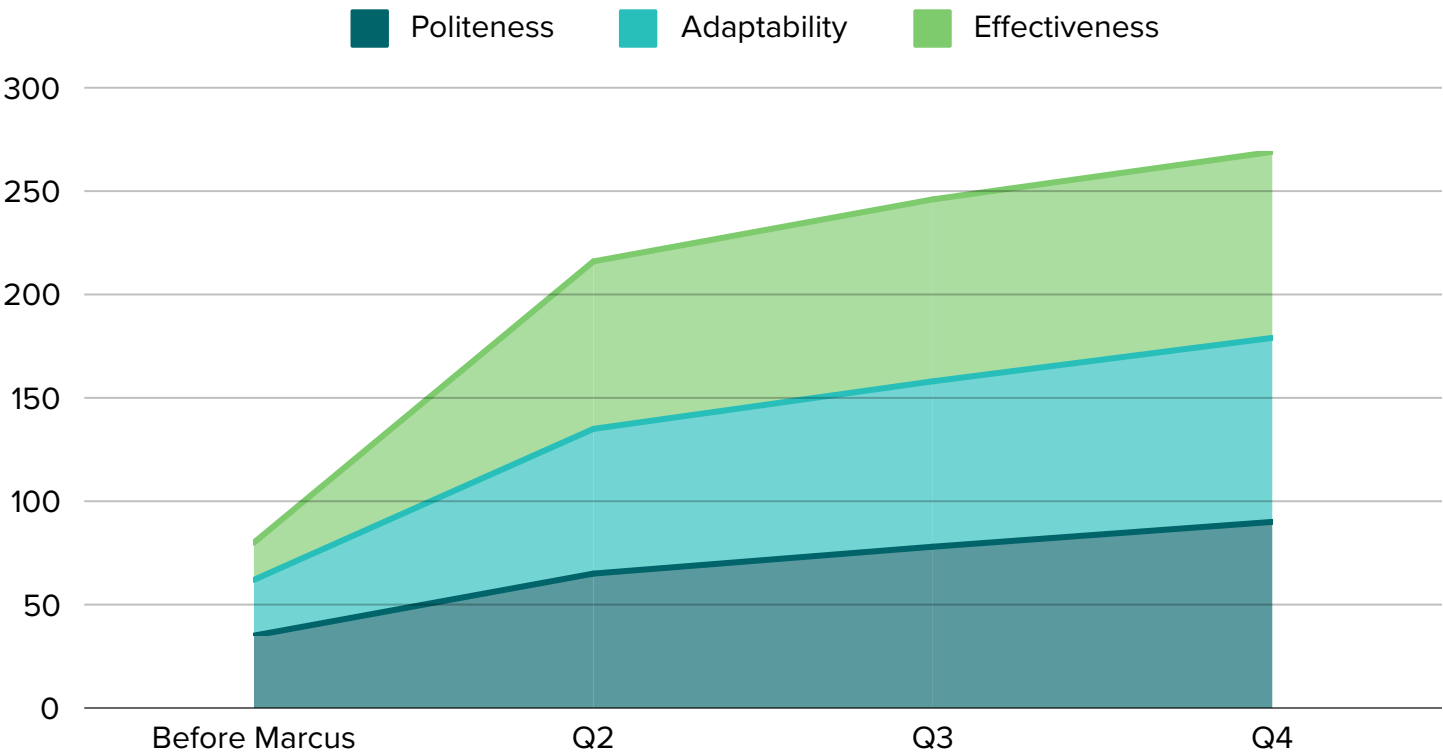
Streamlined Workflow: The integration of Marcus streamlined the entire invoicing process, reducing bottlenecks and ensuring that tasks were completed in a timely manner.

Improved Client Communication: Automated reminders and follow-ups helped maintain consistent communication with clients, leading to better relationships and fewer disputes over payments.

Enhanced Reporting and Analysis: The detailed reports generated by Marcus allowed Intelligent Partners to analyze their financial performance and identify areas for further improvement.

Quote from Sanjeev V, Managing Partner of Intelligent Partners: "The operational efficiencies we've gained from Marcus have been incredible. The software has streamlined our processes and provided us with the insights we need to run our business more effectively."

Improvements in client satisfaction survey



Conclusion

With Marcus now fully integrated into their operations, Intelligent Partners is well-equipped to handle future growth and continue providing exceptional service to their clients.

As Mesha continues to innovate and enhance its offerings, the partnership between the two companies is set to strengthen further, driving even greater results in the years to come.

Contact

For feedback, partnerships, or further information, please feel free to contact us at sales@mesha.club

Mesha

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